



**STATE OF MISSOURI  
STATE TAX COMMISSION  
REQUEST FOR PROPOSAL (RFP)**

**RFP NO. 19500700001  
TITLE: Property Appraisal  
ISSUE DATE: 03/01/2007**

**BUYER: Stacey Jacobs  
PHONE NO.: (573)751-1716  
E-MAIL: stacey.jacobs@stc.mo.gov**

**RETURN PROPOSAL NO LATER THAN: 03/20/2007 AT 2:00 PM CENTRAL TIME**

**MAILING INSTRUCTIONS:** Print or type **RFP Number** and **Return Due Date** on the lower left hand corner of the envelope or package. Delivered sealed proposals must be in the STC office (301 West High Street, Room 840) by the return date and time.

<b>RETURN PROPOSAL TO:</b>	<b>(U.S. Mail)</b>	<b>or</b>	<b>(Courier Service)</b>
	<b>STATE TAX COMMISSION</b>		<b>STATE TAX COMMISSION</b>
	<b>PO BOX 146</b>		<b>301 WEST HIGH STREET, ROOM 840</b>
	<b>JEFFERSON CITY MO 65102-0146</b>		<b>JEFFERSON CITY, MO 65101</b>

**CONTRACT PERIOD: Date of Award through 06/15/2007.**

**DELIVER SUPPLIES/SERVICES FOB (Free on Board) DESTINATION TO THE FOLLOWING ADDRESS:**

**State Tax Commission  
301 West High Street, Room 840  
P.O. Box 146  
Jefferson City, MO 65102-0146**

The offeror hereby declares understanding, agreement and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all requirements and specifications contained herein and the State Tax Commission Terms and Conditions Request for Proposal (Revised 02/10/06). The offeror further agrees that the language of this RFP shall govern in the event of a conflict with his/her proposal. The offeror further agrees that upon receipt of an authorized purchase order from the State Tax Commission or when this RFP is countersigned by an authorized official of the State Tax Commission, a binding contract shall exist between the offeror and the State Tax Commission, State of Missouri.

**SIGNATURE REQUIRED**

DOING BUSINESS AS (DBA) NAME		LEGAL NAME OF ENTITY/INDIVIDUAL FILED WITH IRS FOR THIS TAX ID NO.	
MAILING ADDRESS		IRS FORM 1099 MAILING ADDRESS	
CITY, STATE, ZIP CODE		CITY, STATE, ZIP CODE	
CONTACT PERSON		EMAIL ADDRESS	
PHONE NUMBER		FAX NUMBER	
TAXPAYER ID NUMBER (TIN)	TAXPAYER ID (TIN) TYPE (CHECK ONE) ____ FEIN ____ SSN	VENDOR NUMBER (IF KNOWN)	
VENDOR TAX FILING TYPE WITH IRS (CHECK ONE) ____ Corporation ____ Individual ____ State/Local Government ____ Partnership ____ Sole Proprietor ____ Other _____			
AUTHORIZED SIGNATURE		DATE	
PRINTED NAME		DATE	

## **I. INTRODUCTION AND GENERAL INFORMATION**

### **A. Introduction:**

This document constitutes an invitation for competitive, sealed proposals for the provision of appraisal services. A proposal must be a single dollar amount for the completion of the entire thirty-five (35) Uniform Residential Appraisal Reports (URAR) of certain residential parcels in Taney County, Missouri pursuant to the specifications below. "Residential parcels" as used throughout this contract are defined as improved, single family residential parcels, but do not include condominiums or manufactured homes. All proposals must be submitted, i.e., postmarked or physically received by the State Tax Commission, by 03/20/2007. Proposals should be submitted to:

**Stacey Jacobs  
State Tax Commission  
P.O. Box 146  
Jefferson City, MO 65102**

### **B. Background Information**

The State Tax Commission wishes to determine the market value of certain residential parcels in Taney County. To that end, the State Tax Commission will contract with an appraiser (the result of this bidding process). The appraiser awarded this proposal, will appraise thirty-five (35) residential parcels from a randomly selected sample. The appraiser will be presented with parcel information (with the valuation information redacted) for each of the samples. Such appraisals must be completed by 05/24/2007.

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## **II. PERFORMANCE REQUIREMENTS**

### **A. Requirements**

1. The contractor or the contractor's appraiser must hold a residential or general certification with the Missouri Real Estate Appraisers Commission.
2. The contractor shall provide all labor, equipment, and materials necessary to perform the defined duties and cover all expenses incurred.
3. The contractor, his or her staff, and/or any subcontractor shall not be a resident or own property within Taney, nor be an employee or former employee of, nor have performed any services under contract for either Taney County or the State Tax Commission.
4. The contractor shall appraise thirty-five (35) residential parcels in Taney County pursuant to the following provisions:
  - a. The contractor may be required to make one trip to Jefferson City, Missouri to assist in the random selection of the parcels to be appraised, but will otherwise conduct the appraisals in Taney County, Missouri.
  - b. The contractor will be provided with the parcel information (with valuation information redacted) from the records of the Taney County Assessor's Office for a number of selected properties sufficient to allow the contractor to appraise thirty-five (35) properties sequentially. Information concerning more than the necessary thirty-five (35) properties will be provided to assure that if one or more property owners does not wish to cooperate, the contractor, by proceeding sequentially through the samples, can and shall appraise thirty-five (35) residential properties.
  - c. At no time is the contractor to accept information from any source pertaining to the values placed upon the samples by the Taney County Assessor or by the State Tax Commission or its staff.
  - d. The contractor shall appraise the sample properties based upon an exterior inspection and other material facts and shall not make an interior inspection of the properties.
  - e. The contractor shall prepare, pursuant to Uniform Standards of Professional Appraisal Practice (USPAP) standards, thirty-five (35) written appraisal reports which conform with the Uniform Residential Appraisal Report and which indicate the fair market value of the properties as of 01/01/2007. Fair market value is defined as the most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:
    1. Buyer and seller are typically motivated;
    2. Both parties are well informed or well advised, and acting in what they consider their best interests;
    3. A reasonable time is allowed for exposure in the open market;
    4. Payment is made in terms of cash in United States dollars or in terms of financial arrangements comparable thereto; and
    5. The price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.
  - f. The completed appraisal reports shall be submitted to the STC no later than 05/24/2007.

### **III. INVOICING AND PAYMENT REQUIREMENTS**

The contractor must, upon completion and acceptance of the thirty-five (35) appraisals by the State Tax Commission, submit an invoice to:

Stacey Jacobs  
State Tax Commission  
P.O. Box 146  
Jefferson City, MO 65102-0146

The State Tax Commission shall pay the contractor for the total job after the completion and acceptance of the thirty-five (35) appraisals. Travel time, mileage or any expenses should be included in the proposal.

### **IV. GENERAL CONTRACTUAL REQUIREMENTS**

#### **A. Contract Period**

The contract shall run from the time the contract is awarded until 06/15/2007. The contract shall not bind, nor purport to bind, the state for any contractual commitment in excess of the original contract period.

#### **B. Contractor Liability**

The contractor shall be responsible for any and all injury or damage as a result of the contractor's negligence involving any service provided under the terms and conditions, requirements and specifications of the contract. In addition to the liability imposed upon the contractor on account of personal injury, bodily injury (including death) or property damage suffered as a result of the contractor's negligence, the contractor assumes the obligations to save the state of Missouri, including its agencies, employees and assigns, from every expense, liability, or payment arising out of such negligent act. The contractor also agrees to hold the state of Missouri, including its agencies, employees and assigns, harmless for any negligent act or omission committed by any subcontractor or other person employed by or under the supervision of the contractor under the terms of the contract.

However, the contractor shall not be responsible for any injury or damage occurring as a result of any negligent act or omission committed by the State of Missouri, including its agencies, employees and assigns.

#### **C. Subcontractors**

If submitted in the proposal and approved by the State Tax Commission, the contractor may subcontract for those services described herein provided that any subcontracts include appropriate provisions and contractual obligations to ensure the successful fulfillment of all contractual obligations agreed to by the contractor and the State of Missouri and to ensure that the State of Missouri is indemnified, saved and held harmless against any and all claims of damage, loss and cost (including attorney fees) of any kind related to a subcontract in those matters described in the contract between the State of Missouri and the contractor. The contractor shall expressly understand that utilization of a subcontractor to provide any of the services in the contract shall in no way relieve the contractor of the responsibility for providing the services as described and set forth herein.

#### **D. Minority Subcontractor Usage**

The contractor shall make a good faith effort to obtain minority participation in any new subcontracting activities. The contractor shall have as a goal subcontracting at least five percent (5%) of the total dollar value of the contract to businesses that qualify as minority business enterprises (MBE) or as woman business enterprises (WBE).

#### **E. Insurance**

The contractor shall agree that the State Tax Commission, State of Missouri cannot save and hold harmless and/or indemnify the contractor or employees against liability incurred or arising as a result of any activity of the contractor or any activity of the contractor's employees related to the contractor's performance under the contract.

Therefore, the contractor must acquire and maintain adequate liability insurance in the form(s) and amount(s) sufficient to protect the State Tax Commission, its employees, its clients, and the general public against any such loss, damage and/or expense related to his/her performance under the contract. The insurance coverage shall include general liability and appropriate professional liability.

## **F. Contractor Status**

The contractor represents himself or herself to be an independent contractor offering such services to the general public and shall not represent himself/herself or his/her employees to be an employee of the State of Missouri. Therefore, the contractor shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers' compensation, employee insurance, minimum wage requirements, overtime, etc., and agrees to indemnify, save, and hold the State Tax Commission, State of Missouri, its officers, agents, and employees, harmless from and against any and all loss, cost (including attorney fees), and damage of any kind related to such matters.

## **G. Property of State**

The contractor shall agree that all exhibits, materials, film negatives, camera ready artwork, design features and concepts developed as a result of the contract shall become the property of the State of Missouri, with all rights and interests for present and future publication, display, sale, copyright or other use as deemed appropriate by the State Tax Commission. The contractor shall further agree that all discussions with the contractor and all information gained by the contractor as a result of the contractor's performance under the contract shall be confidential and that no reports or materials prepared, as required by the contract, shall be released to the public without the prior written consent of the State Tax Commission.

## **H. Missouri State Tax Commission Terms and Conditions**

Request for Proposal and subsequent Contracts and/or Purchase Orders are subject to the attached Missouri State Tax Commission Terms and Conditions.

## **V. PROPOSAL SUBMISSION INFORMATION**

### **A. Submission of Proposals**

This document constitutes an invitation for competitive, sealed proposals for the provision of appraisal services. A proposal must include (1) a single dollar amount for the cost of the completion of the entire thirty-five (35) URAR appraisals; and (2) the hourly rate and the conditions concerning that rate that the contractor would charge for additional services related to these appraisals (including but not limited to testimony concerning, or a defense of the appraisals) if such services are required after the expiration of this contract.

All proposals must be submitted, i.e. postmarked or physically received by the State Tax Commission, by 03/20/2007. Proposals should be submitted to:

Stacey Jacobs  
State Tax Commission  
P.O. Box 146  
Jefferson City, MO 65102-0146

## **VI. EVALUATION AND AWARD PROCESS**

### **A. Evaluation**

After determining that a proposal satisfies the mandatory requirements stated in the Request For Proposal, the evaluator(s) shall use both objective analysis and subjective judgment in conducting a comparative assessment of the proposal in accordance with the evaluation criteria stated below:

- a. Cost..... 50%
- b. Experience and Reliability,  
Expertise of Personnel,  
Proposed Method of Performance.... 50%

After an initial screening process, a question and answer conference or interview may be conducted with the offeror, if deemed necessary. In, addition, the offeror may be asked to make an oral presentation of his or her proposal during the conference. Attendance cost at the conference shall be at the offeror's expense. All arrangements and scheduling shall be coordinated by the State Tax Commission.

## **B. Evaluation of Cost**

The objective evaluation of cost will be based upon the total price for the completion of the thirty-five (35) appraisals.

## **C. Evaluation of Offeror's Experience and Reliability**

Experience and reliability of the offeror's organization are considered subjectively in the evaluation process. Therefore, the offeror is advised to submit any information that documents successful and reliable experience in past performances related to the requirements of this Request for Proposal. The offeror should provide the following information related to previous and current services/contracts performed by the offeror's organization and any proposed subcontractors which are similar to the requirements of the RFP:

- a. Name, address, and telephone number of client and a representative of that client who may be contacted for verification of all information submitted;
- b. Dates of the service/contract; and
- c. A brief written description of the specific prior services performed and requirements thereof.

The above information may be shown on the form attached as Exhibit A to this RFQ or in a similar manner.

## **D. Evaluation of Expertise of Offeror and Offeror's Personnel**

The qualifications of the offeror and offeror's personnel to perform the requirements of this RFP, whether from the offeror's organization or from a proposed subcontractor, will be subjectively evaluated. Therefore, the offeror should submit detailed information related to the experience and qualifications, including education and training, of proposed personnel.

The offeror should submit a resume or list of all licenses, certifications, accreditations, and other pertinent information pertaining to the qualifications of the offeror and the offeror's personnel.

The offeror may utilize Exhibit B for summarizing the personnel information and should submit detailed resumes for proposed key personnel.

## **E. Minority Participation**

Executive Order 98-21 directs state agencies to increase the participation of certified minority business enterprises (MBE) and women business enterprises (WBE) in state procurements. MBE/WBE certification is required to be considered an eligible MBE/WBE in meeting participation goals. To get information about becoming a certified MBE or WBE, go to the Workforce Diversity website at <http://www.oa.mo.gov/oswd> or contact the MBE/WBE Workforce Diversity Program at 877-259-2963.

## **F. Award Date**

The State Tax Commission expects to award this contract on or before 04/02/2007.

**EXHIBIT A**

**PRIOR EXPERIENCE OF OFFEROR**

<b>Reference Information (Prior Services Performed For:)</b>	
Company Name:	
Address:	
Contact Name:	
Contact Phone Number:	
Description of Prior Services (include Dates)	

<b>Reference Information (Prior Services Performed For:)</b>	
Company Name:	
Address:	
Contact Name:	
Contact Phone Number:	
Description of Prior Services (include Dates)	

**EXHIBIT B**

**PERSONNEL EXPERTISE SUMMARY**  
**(Also attach resumes for key personnel)**

Personnel	Background and Expertise of Personnel
1. _____ (Name)  _____ (Title)	
2. _____ (Name)  _____ (Title)	
3. _____ (Name)  _____ (Title)	
4. _____ (Name)  _____ (Title)	
5. _____ (Name)  _____ (Title)	
6. _____ (Name)  _____ (Title)	
7. _____ (Name)  _____ (Title)	